

## TRANSNATIONAL CABLE CHANNELS IN THE TAIWANESE MARKET

A Study of Domestication through Programming Strategies

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**Abstract** / From the perspective of an unbalanced flow of information and cultural (media) imperialism theory, the focus of the impact of transnational media has been on how countries that import television programming are affected. However, following the logic of capitalism and the innovation of communication technologies, the objective of transnational media conglomerates to maximize their profits has been to attract more local audiences in import countries. Therefore, instead of analysing the effect of media imperialism on host countries as most research to date has done, this study focuses on the influence of the importing countries on the domestication of cable programming of transnational cable channels. Overall, the purposes of the study are to: (1) reveal the strategy of domesticating transnational cable channels in Taiwan, (2) analyse the domestication of transnational cable channel programming and (3) evaluate the effect of their domestication mainly from the viewpoint of the Taiwanese audience.

**Keywords** / cable television / media globalization / programming domestication / transnational cable channels / transnational media conglomerates

### Introduction

The advent of Taiwan's cable television service in the 1970s brought more information and programming choices to the Taiwanese people, who prior to this could only receive three government-controlled terrestrial television networks. At the outset of cable television, the Taiwanese government banned the new service, claiming political and national security concerns. However, after more than one-and-a-half decades of illegal operation, the Taiwanese government was forced, mainly by opposition parties, to enact a cable television law in July 1993 that legalized the industry.

This legislation was regarded as a media revolution in Taiwan, as the government had previously used martial law to suppress new media outlets. Media observers and researchers predicted that the newly legalized cable industry would become a strong competitor not only to the electronic media, but also to print media, bringing Taiwan more information and programming choice. As some surveys show, the penetration rate of Taiwan's cable television service increased rapidly after the Cable Television Act was passed, going from

39 percent in 1992 to 56 percent in 1993 and reaching approximately 75 percent in 2000 (*Cable and Satellite*, 1997; Chen, 2001).

## **Transnational Media Corporations**

The trend of globalization is not only affecting trade and finance, but also cultural activities. Hamelink (1993) contends that the globalization process undeniably affects the communications industry as it extends its activities geographically to reach towards 'statelessness', and an oligopolistic market of a few global media firms is developing. Mainly due to the advent of communication technologies, media firms make foreign investments to penetrate a foreign market, to create production and distribution efficiency, to overcome regulatory barriers to entry, and to build their own transnational media empires (Gershon, 1993).

As Gershon (1993) stresses, giant transnational media conglomerates (TNMCs) are the most powerful economic forces within global media activities. Data show that the total sales in 1989 of the Dutch company Philips, one of the leading transnational media and electronics firms, amounted to US\$30 billion, 94 percent of which was acquired outside its home country (Hamelink, 1993). Certain media firms have become TNMCs and have performed a vital role as global organizations during the last dozen or so years. Rupert Murdoch's media empire, News Corporation, provides a perfect example of media globalization since he owns newspapers in Europe, satellite services in Asia and print and electronic media in the US (Negrine, 1996). According to Gomery's prediction, a handful of TNMCs based in the US and/or Europe will dominate media production, distribution and presentation around the world in the 21st century (Gomery, 1993).

Over the last several decades, global television programming has been a one-way flow from developed countries such as the US to developing countries such as those in Asia (Nordenstreng and Varis, 1974). Statistics for the early 1990s show that US mass media products accounted for 75 percent of broadcast and basic cable television revenues, 85 percent of pay-TV revenues, 55 percent of theatrical film rentals and 55 percent of home video billings worldwide (Bernstein, 1990; cited in Turow, 1992: 209). Television, probably the most significant carrier of western popular culture, has carried US programming into homes everywhere around the world (Lent, 1995).

## **Taiwan's Cable Programming Market**

At the outset, beginning in the late 1970s, most of Taiwan's cable television programming consisted of pirated videotapes, pirated movies and Japanese variety shows. Following the passage of the Cable Television Act in July 1993, Taiwan's cable system operators encountered stronger pressure than before from copyright owners such as film production and distribution companies, and even from the US government on behalf of its film companies (Government Information Office, 1995). Thus, finding sources of authorized programming has become a major hurdle for legal cable television operations. Under the Act, the

Government Information Office (GIO)<sup>1</sup> reserves the right to suspend system licences if cable television operators broadcast any pirated programming.

Nevertheless, there has been a large gap between the demand for television programming and the supply since cable television was legalized. Before it decided to legalize 'the fourth channel',<sup>2</sup> the government had worried that the sufficient provision of cable television programming would be a critical problem for the cable television industry (Chang, 1991). According to a 1995 government report, the three terrestrial television stations broadcast approximately 21,000 hours of programming per year, of which 12 percent consisted of foreign programmes and 8 percent rebroadcast programmes (Government Information Office, 1995). All existing domestic cable channels in Taiwan combined require 1000 hours programming per day and televise a total of more than 360,000 hours of programming per year. That is 16 times more than the total broadcasting hours of the then three existing television stations (Government Information Office, 1995).

Therefore, the Cable Television Act mandates that domestically produced programming may not account for less than 20 percent of cable television programming (Article 36). This compares to the Broadcasting and Television Act, which regulates radio and television stations and dictates that at least 70 percent of radio and television programming must be domestically produced (Article 19). In other words, the Act allows cable television systems to provide as much as 80 percent of airtime for international programming, much more than broadcast television's 30 percent. That is to say, the legalization of cable television has given transnational media companies, mainly US cable channel operators, an extensive opportunity to introduce their products to Taiwan and to participate in its cable television industry.

Similarly, the legalization of Taiwan's cable industry has intensified competition in the programming industry. As of the end of 2002, Taiwan had 123 cable television channels (Government Information Office, 2003). Nevertheless, the maximum capacity of channels in the average Taiwanese cable system is approximately 80 channels. Except for five requisite terrestrial television stations and several shopping channels that occupy around 10 channels on an average cable system's lineup, the existing 123 channels are forced to compete for the remaining 70 channels in each cable system. Thus, for cable channel operators, Taiwan's market is comparatively competitive in terms of the channel capacity of each cable system.

Aside from those domestic channels producing programmes exclusively for their own use, cable channels in Taiwan's market can be divided into two other categories: transnational cable channels, such as HBO and Discovery, and local channels acquiring programmes domestically and internationally. Gallup Taiwan, Inc. conducted a research project in June 2001 to discover the most frequently viewed cable channels by the audience in Taiwan (Table 1).

### **Transnational Cable Channels<sup>3</sup> in Taiwan**

The mixture of Taiwan's cable channels is perhaps the most cosmopolitan in Asia (Hughes, 1996). As mentioned earlier, Taiwan's cable channel operators

TABLE 1

**The Top 10 Most Frequently Viewed Cable Channels by Audiences in Taiwan**

Rank	Channel Name	Remarks
1	Home Box Office (HBO)	TNMC (US)
2	TVBS	Taiwan/Hong Kong joint venture
3	San-Li Taiwan	Taiwan's local channel
4	Discovery Channel	TNMC (US)
5	San-Li City	Taiwan's local channel
6	GTV 28	Taiwan's local channel
7	ETTV News	Taiwan's local channel
8	TVBS-G	Taiwan's local channel
9 =	National Geographic Channel	TNMC (US)
9 =	Video Land Japanese	Taiwan's local channel

*Source:* Gallup Taiwan, Inc. (2001).

and production companies do not have the capacity to produce enough programme to fill the increased airtime available on cable television. Anticipating that gap, most cable channel operators have recently been buying the rights to a large amount of programming, most of it North American, but some from Hong Kong and Japan. Additionally, western programming operators have long been aware of the attractiveness of Taiwan's openness to penetration, channel capacity and high daily ratings, and they have sought to use the country as a springboard for entry into the rest of Asia (Bloch-Nazzaro, 1996). Gradually, Taiwan has become an increasingly vital market for transnational television programming distributors.

According to the aforementioned survey conducted by Gallup Taiwan, Inc., three out of the top 10 most frequently viewed cable channels in Taiwan, HBO, Discovery and the National Geographic Channel, are owned by transnational media corporations (Table 1).

As of October 2001, there are 32 transnational cable channels, distributed or operated by 16 local media companies, serving Taiwan's cable programming market.<sup>4</sup> While the amount of Japanese programming on Taiwan's cable systems is significant, the US is clearly the dominant source of Taiwan's foreign programming (Cheng, 1996). Since STAR TV,<sup>5</sup> owned by the News Corporation, launched its services in December 1991 in the Asian Pacific region, which includes Taiwan, China and India, approximately two dozen US cable channels have entered Taiwan's cable market, and some of them have earned a noteworthy level of penetration and programme ratings. Although the Taiwanese government had banned Japanese media products for two decades prior to 1992,<sup>6</sup> Taiwanese audiences have received Japanese programming from its BS-2 direct broadcast satellite (DBS) since it was launched in 1984 due to an unintentional signal spillover problem between the countries (Chan-Olmsted, 1990). Nowadays, Japanese programming is widely distributed in Taiwan's cable market.

STAR TV, the first transnational cable channel operator in Taiwan, provided its service to the Taiwanese audience in 1991, followed by ESPN in

TABLE 2

**The Ranking of the Most Frequently Viewed Transnational Cable Channels by Audiences in Taiwan**

Rank	Channel Name
1	HBO
4	Discovery Channel
9	National Geographic Channel
11	STAR Chinese
14	ESPN
21	STAR Movies – Foreign
25 =	STAR Movies – Mandarin
25 =	MTV
27	STAR Sports
28	Cinemax
34	Super TV (Sony)
37	Disney
40	AXN (Sony)
43	Animal Planet
45	Channel V (News Corporation)
50 =	Cartoon Network
50 =	NHK World Premium
60	Hallmark
70 =	CNBC Asia
70 =	TNT and Cartoon Network
70 =	CNN International
70 =	STAR World
84	BBC World

*Source:* Gallup Taiwan, Inc. (2001).

July 1993 (the same month Taiwan passed the Cable Television Act), and CNN one month later. Despite the fact that Taiwanese audiences have received signals directly from NHK of Japan via satellite dishes since 1988, the first Japanese cable channel officially entering the Taiwanese cable market was NHK-Asia in November 1995. The 32 transnational cable channels can be categorized into seven types of programming: general entertainment, movies, news and information, sports, children's and cartoon, educational and music. As one local cable channel operator notes, European and American media experts are optimistic about the Asian programming market, and lately many of them have viewed Taiwan as a particularly strong market (Leu, 1995).

Besides transnational cable channels, programming in Taiwan's local cable channels can be categorized into three groups: domestically produced programming, domestically acquired programming and internationally purchased programming. The former two may be regarded as domestic programming since they are mostly produced by local production firms. In other words, domestic programming consists of domestic, in-house programming produced either by cable channel operators or by various local production companies.

Theoretically, it would be useful to investigate the ratio of domestic programming to foreign programming on all cable channels available in Taiwan, but unfortunately, such percentages are not available at this time.

Due to Taiwan's lack of sufficient production capability and local production talents for its growing cable market, the channels which broadcast domestically produced programming have been regarded as less competitive than the channels which broadcast foreign programming (Wu, 1991). Consider cable programming of the same genre as an example. In terms of presentation and quality of programming, Taiwan's cable industry has acknowledged that local programming is not able to surpass that of the same genre produced in the US or Japan (Wang, 1996).

In fact, transnational cable channels as well as local cable channels broadcasting foreign programming constantly earn significant rates of penetration and viewership according to various surveys. For instance, HBO, Discovery, National Geographic and STAR Chinese were selected as among the most sought after, popular channels in Taiwan by cable system operators and cable subscribers. In addition to the audience survey conducted by the Gallup Taiwan, Inc. mentioned earlier, a survey of 115 cable system operators was conducted on Taiwan's 104 cable channels in 1996 by the Association of Cable Communication and Development; it reveals that both Discovery and STAR Chinese were evident in the top three, and HBO was in the top five in terms of its programming content and quality. Meanwhile, HBO was ranked by 37 responding system operators as the second most wanted cable channel, Discovery the third, and STAR Chinese the seventh (Hsin, 1996). In terms of channel popularity, HBO was chosen by cable subscribers as the most popular cable channel; Discovery came seventh; and STAR Chinese was the 13th most popular channel in Taiwan (Red Wood Research Services Company, 1997).

## **Domestication of Transnational Cable Channels**

Despite the research results provided in the previous section, transnational media barons Ted Turner and Rupert Murdoch have discovered that the Asian market is 'a tough nut to crack'. They realize that the domestication of, or adding of indigenous ingredients to, programming is especially inevitable for those transnational cable channel operators who wish to be successful in Asian markets (*Campaign*, 1995; Sreberny-Mohammadi, 1996). Thus, the first transnational cable channel in Taiwan, STAR TV has become a pioneer in striving to domesticate its programming in Asia (Chen, 1996a). In May 1994, to follow the trend towards domestication, STAR TV split its music channel into a northern beam targeting Taiwan and a southern beam targeting India, catering more directly to its two largest markets (Nguyen, 1994). He-Lun Chang, a senior producer of the Taiwan branch of the MTV channel, comments that domestication of programming is the key to survival in Taiwan's cable market for transnational cable channels (interview with He-Lun Chang, 2000).

Evidence has revealed that the US dominates the international market for television programmes (Hoskins et al., 1989; Varis, 1974, 1984). Despite the fact that the quality and popularity of US television programmes are widely

recognized to be superior to domestic programmes in most countries, 'cultural discount' inevitably occurs when host countries import US television programmes (Hoskins and Mirus, 1988). Hoskins and Mirus (1988: 500) describe the phenomenon of cultural discount as follows: 'A particular programme rooted in one culture, and thus attractive in that environment, will have a diminished appeal elsewhere as viewers find it difficult to identify with the style, values, beliefs, institutions and behavioral patterns of the material in question'.

Undoubtedly, the popularity and viewership of imported television programmes in domestic markets ensure the ability of transnational media corporations to create more revenue. As McManus's (1994) theory of market-driven journalism suggests, the media make every effort to catch the attention of the audience, and a larger audience will bring in more advertisers for the media to create more profit. Therefore, to reduce the impact of cultural discount and to lure a larger audience, TNMCs definitely exercise various strategies of domestication concerning their television programmes for the purpose of attracting more viewers to their programmes and cable channels.

A range of studies from diverse perspectives have discussed how TNMCs can appeal to larger audiences in foreign television markets, and these studies have proposed various strategies such as 'cultural differentiation' (Lee and Wang, 1995), 'cultural proximity' (Rogers and Antola, 1985; Straubhaar, 1991), 'localization' (Weber, 2003) and 'indigenization' (Chan and Ma, 1996). In addition, the term 'domestication' has been used in numerous studies of international news and television programming (Gurevitch, 1996; Silcock, 1994; Sreberny-Mohammadi, 1996). Learning from the aforementioned literature, this study hereby characterizes the domestication of programming as a strategy of adding indigenous ingredients to programme presentation in order to lure a larger local audience.

Researchers state that few studies focus on the domestication of programming of transnational cable channels in Taiwan (Chen, 1996b; Chen, 1998). Examining STAR TV's market strategy in Asia, Hsu (1997) finds that STAR TV adds dubbing and subtitles to most of its non-locally produced programmes. From the perspective of cultural proximity, Lee (1996) analyses how three transnational cable channels domesticate their programming in Taiwan and identifies some programming strategies of domestication employed by these channels: dubbing, subtitles, local hosts and local production.

In practice, STAR TV domesticates its programming according to the characteristics and regulations in various Asian markets. For instance, STAR TV employs Mandarin voiceover for every non-locally produced drama in China, since the Chinese government mandates all transnational channels to do so. Additionally, STAR TV offers local hosts or commentators, Mandarin on-air promotion and teasers to domesticate its programming. In India, STAR TV mainly utilizes dubbing, Hindi or Tamil voiceover, and local hosts, but without subtitles, for non-locally produced programming (interview with Cathy Yu, 2003).

In Asia, ESPN consists of five broadcast regions: ESPN-Taiwan, ESPN-India, ESPN-China, ESPN-MBC (Korea) and ESPN-Asia. Local audiences' preferences for sports and sports celebrities dictate ESPN's programming

priorities. For the non-locally produced programming, ESPN offers nearly similar programming strategies of domestication in Taiwan, China and Korea, including dubbing, subtitles, local hosts or commentators and on-air promotions. Most programming in India and that of ESPN-Asia is mainly English and with no dubbing and/or subtitles (interview with Jammie Chen, 2003).

## Research Methodology

The study employs both quantitative and qualitative methods to explore the programming, as well as marketing, strategies of domestication by the transnational cable channels in Taiwan. The research methods and procedures designed for this study are as follows.

### *Study Subjects*

As of October 2000, when the study was conducted, there were 15 cable channels owned by five US TNMCs in the Taiwanese market (Table 3).

Depending on channel ownership and programming types, this study selects five cable channels as research subjects: HBO, owned by AOL-Time Warner, Super TV, owned by Sony Corporation, Disney Channel, owned by the Walt Disney Company, STAR Sports, owned by the News Corporation, and MTV, owned by Viacom Inc.

### *Programmes of Analysis*

First of all, for this study, all programmes of the five cable channels were recorded over a period of one whole week (from 16 October to 22 October

**TABLE 3**  
**The Transnational Cable Channels Owned by US TNMCs**

TNMC	Channel	Programming Type
1. Sony Corporation	AXN	Action movies
	Super TV	General
2. News Corporation	STAR Movies	Movies
	STAR Movies	Foreign movies
	STAR Chinese	General
	STAR World	General
	Channel V	Music
3. The Walt Disney Company	STAR Sports	Sports
	Disney Channel	Children
	ESPN	Sports
4. AOL-Time Warner Inc.	HBO	Movies
	Cinemax	Movies
	CNN International	News
5. Viacom	Cartoon Network	Children
	MTV	Music



2000). Then, this study randomly selected three days as samples for analysis: 16 October (Monday), 18 October (Wednesday) and 21 October (Saturday). The study completely analysed 383 programmes, or 360 hours, from the five transnational cable channels (see Table 4).

### *Research Methods*

The study employed three research methods to investigate the programming domestication strategies by transnational cable channels in Taiwan: content analysis to explore how programming of transnational cable channels has been domesticated; the in-depth interview to evaluate programming strategies of domestication in Taiwan and discover rationales for domesticating programming; and the focus group discussion to discover viewers' opinions of programming domestication strategies and recognize the effect of domesticated programming.

### *Content Analysis*

Due to the lack of studies on programming strategies of transnational cable channels in Taiwan, the researcher first asked coders of this study to review eight hours of programmes on each channel and categorize their programming domestication strategies. Based on Lee's (1996) research and coders' primitive conclusions, this study classifies programming domestication strategies as: dubbing, Mandarin voiceover, Chinese subtitles, Taiwanese hosts, Taiwanese commentators, Mandarin on-air promotions, teasers and local Taiwanese footage. Meanwhile, all coders recorded basic information about each programme, including first-run or rebroadcast, programme type, programme length, domestic production or non-domestic production, and strategies of domestication.

### *In-Depth Interview*

In addition to programming content analysis, the researcher interviewed 13 high-ranking members of management of the transnational cable channels being surveyed, such as chief operation officers, general managers, marketing managers, sales managers, programme managers, programming directors, and senior programme producers (see list of interviews at end of this article). These interviews were conducted in November and December 2000 either in person

**TABLE 4**  
**Number of Programs and Total Programming Hours for Each Channel**

	HBO	Super TV	MTV	Disney	STAR Sports	Total
Hours	72	72	72	72	72	360
Number of programmes	44	74	77	124	64	383

in Taiwan or via phone calls to Singapore. The questions designed for the in-depth interviews include basic operation data, channel positioning strategy, channel advantages and disadvantages, market competition strategy, programming domestication, evaluation of domestication strategies, future development, etc.

### *Focus Group Discussions*

In order to discover the effect of domesticating programming and realize the Taiwanese audience's preferences for and opinions of programming domestication in particular, and transnational cable channels in Taiwan in general, this study conducted three focus group discussions held in northern, central and southern Taiwan. The three focus group discussions were held on 15 December in Taipei, 22 December in Chungwa and 23 December in Kaohsiung, respectively. A total of 20 cable audience members were selected according to demographics and invited to attend the study's focus group discussions in the three different locations around the island. The topics for discussion included their programme preferences, comments on programming domestication strategies by the transnational cable channels, suggestions for domestically produced programming and other opinions on channel marketing and positioning strategies, etc.

## **Results**

The findings of this study are as follows.

### *Programming Domestication Strategies*

Of a total of 383 programmes surveyed on five transnational cable channels, the Disney Channel has the highest percentage of first-run programmes, 93.5 percent, followed by MTV, 90.9 percent, STAR Sports, 79.7 percent, Super TV, 77 percent and HBO has the lowest, 13.6 percent. On average, 300 out of 383 programmes, approximately 78.3 percent, of the five cable channels were first-run (Table 5). Statistically, the rebroadcast rates among the five channels were significantly different ( $p < .001$ ).

**TABLE 5**  
**The Percentage of First-Run Programmes on Each Channel**

	HBO ( <i>N</i> = 44)	Super TV ( <i>N</i> = 74)	MTV ( <i>N</i> = 77)	Disney ( <i>N</i> = 124)	STAR Sports ( <i>N</i> = 64)	Total ( <i>N</i> = 383)
First-run	13.6% (6)	77% (57)	90.9% (70)	93.5% (116)	79.7% (51)	78.3% (300)
Rebroadcast	86.4% (38)	23% (17)	9.1% (7)	6.5% (8)	20.3% (13)	21.7% (83)

$$\chi^2 = 132.7, \text{ d.f.} = 4, \text{ ***}p < .001.$$

As for programme length, 191 out of the 383 programmes, or 49.9 percent, were 30 minutes or shorter, and only six programmes, or 1.6 percent, were longer than 150 minutes. Individually, 114 out of 124 programmes, or 91.9 percent, on the Disney channel were 30 minutes or less, while only one out of 44 programmes, or 2.3 percent, on HBO was shorter than 30 minutes. In total, roughly three out of four programmes on the five channels were 60 minutes or less (Table 6).

As for programme types, 230 out of the 383 programmes, or 60.1 percent, were entertainment, followed by children's, 30.3 percent, instructional, 8.4 percent, educational, 1.3 percent, and none of the surveyed programmes was cultural (Table 7). Among the five channels, all of the programmes on HBO and MTV were entertainment, while the Disney Channel has the highest percentage, 83.9 percent, of children's programmes.

Of the 383 programmes surveyed, only approximately 30 percent of the programmes, or 113, were locally produced (Table 8). Among the five cable channels, MTV has the highest percentage, 94.8 percent, of locally produced programmes, followed by Super TV, 54.1 percent; HBO, Disney Channel, and STAR Sports all had no locally produced programmes during the time-period surveyed.

As for programming domestication, 235 out of 270 non-locally produced programmes, or approximately 87 percent, pursued programming domestication strategies, while 35, or approximately 13 percent, did not pursue any programming domestication. Separately, 100 percent of programmes on HBO, Super TV and Disney Channel exercised programming domestication strategies, while 75 percent of MTV programmes and 46.9 percent of STAR Sports practised programming domestication (Table 9).

According to the literature and the primitive categorization of this study,

TABLE 6

Programme Lengths for Each Channel

	HBO ( <i>N</i> = 44)	Super TV ( <i>N</i> = 74)	MTV ( <i>N</i> = 77)	Disney ( <i>N</i> = 124)	STAR Sports ( <i>N</i> = 64)	Total ( <i>N</i> = 383)
30 min. or less	2.3% (1)	29.7% (22)	40.3% (31)	91.9% (114)	35.9% (23)	49.9% (191)
31–60 min.	0% (0)	56.8% (42)	41.6% (32)	1.6% (2)	26.6% (17)	24.3% (93)
61–90 min.	43.2% (19)	4.1% (3)	5.2% (4)	6.5% (8)	10.9% (7)	10.7% (41)
91–120 min.	47.7% (21)	8.1% (6)	5.2% (4)	0% (0)	7.8% (5)	9.4% (36)
121–150 min.	6.8% (3)	0% (0)	1.3% (1)	0% (0)	18.8% (12)	4.2% (16)
151–180 min.	0% (0)	1.4% (1)	6.5% (5)	0% (0)	0% (0)	1.6% (6)

TABLE 7

**Percentage of Programme Types on Each Channel**

	HBO ( <i>N</i> = 44)	Super TV ( <i>N</i> = 74)	MTV ( <i>N</i> = 77)	Disney ( <i>N</i> = 124)	STAR	
					Sports ( <i>N</i> = 64)	Total ( <i>N</i> = 383)
Instructional	0% (0)	5.4% (4)	0% (0)	0% (0)	43.8% (28)	8.4% (32)
Educational	0% (0)	5.4% (4)	0% (0)	0.8% (1)	0% (0)	1.3% (5)
Cultural	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)
Children's	0% (0)	16.2% (12)	0% (0)	83.9% (104)	0% (0)	30.3% (116)
Entertainment	100% (44)	73% (54)	100% (77)	15.3% (19)	56.3% (36)	60.1% (230)

TABLE 8

**The Percentage of Locally and Non-Locally Produced Programmes on Each Channel**

	HBO ( <i>N</i> = 44)	Super TV ( <i>N</i> = 74)	MTV ( <i>N</i> = 77)	Disney ( <i>N</i> = 124)	STAR	
					Sports ( <i>N</i> = 64)	Total ( <i>N</i> = 383)
Local production	0% (0)	54.1% (40)	94.8% (73)	0% (0)	0% (0)	29.5% (113)
Non-local production	100% (44)	45.9% (34)	5.2% (4)	100% (124)	100% (64)	70.5% (270)

TABLE 9

**Domestication of Non-Locally Produced Programmes on Each Channel**

	HBO ( <i>N</i> = 44)	Super TV ( <i>N</i> = 34)	MTV ( <i>N</i> = 4)	Disney ( <i>N</i> = 124)	STAR Sports ( <i>N</i> = 64)	Total ( <i>N</i> = 270)
Yes	100% (44)	100% (34)	75% (3)	100% (124)	46.9% (30)	87% (235)
No	0% (0)	0% (0)	25% (1)	0% (0)	53.1% (34)	13% (35)

there are eight programming strategies cable channels can adopt to be more domesticated for their local audience, including dubbing, Mandarin voiceover, Chinese subtitles, Taiwanese hosts, Taiwanese commentators, Mandarin on-air promotions, teasers and local Taiwanese footage. Mandarin on-air promotions, evident in 82.1 percent of programmes, were the most popular strategy that the transnational cable channels used to promote programming domestication, followed by dubbing, 53.2 percent, teasers, 52.3 percent, Chinese subtitles,

39.6 percent, Mandarin voiceover, 23.4 percent, Taiwanese commentators, 7.7 percent, Taiwanese hosts, 4.3 percent, and local Taiwanese footage, 0.9 percent (Table 10).

Further, Super TV utilized the highest proportion of strategies of domestication, six out of the eight, for its programmes, not adding Taiwanese hosts or commentators. HBO offered subtitles and teasers on all of its programmes. All programmes on MTV offered Chinese subtitles; 33 percent of them added Taiwanese footage, but none of the other strategies of domestication was offered by MTV. All programmes on Disney offered Mandarin on-air promotions, and all programmes on STAR Sports added Mandarin voiceover.

### *Evaluation of Programming Domestication*

Most high-ranking members of management we interviewed confirm that programming domestication is significant to the success of their channels in local markets. However, whether their channel offers locally produced programmes or employs programming domestication depends not only on preferences and acceptance of the domestic audience in particular, but it also depends on the marketing and programming strategies employed by their mother company as a whole.

**TABLE 10**  
**Programme Domestication Strategies for Each Channel**

	HBO ( <i>N</i> = 44)	Super TV ( <i>N</i> = 34)	MTV ( <i>N</i> = 3)	Disney ( <i>N</i> = 124)	STAR Sports ( <i>N</i> = 30)	Total ( <i>N</i> = 235)
Dubbing	0% (0)	44.1% (15)	0% (0)	88.7% (110)	0% (0)	53.2% (125)
Chinese subtitles	100% (44)	91.2% (31)	100% (3)	12.1% (15)	0% (0)	39.6% (93)
Mandarin voiceover	0% (0)	2.9% (1)	0% (0)	19.4% (24)	100% (30)	23.4% (55)
Taiwanese hosts	0% (0)	0% (0)	0% (0)	0% (0)	33.3% (10)	4.3% (10)
Taiwanese commentators	0% (0)	0% (0)	0% (0)	0% (0)	60% (18)	7.7% (18)
Mandarin on-air promotions	97.7% (43)	73.5% (25)	0% (0)	100% (124)	3.3% (1)	82.1% (193)
Teasers	100% (44)	44.1% (15)	0% (0)	41.9% (52)	40% (12)	52.3% (123)
Local Taiwanese footage	0% (0)	2.9% (1)	33.1% (1)	0% (0)	0% (0)	0.9% (2)

Apparently, most TNMCs do not necessarily offer their cable television services to Taiwan's market exclusively; instead, most of them serve the Asian region as a whole. Thus, it would not be practical if they were to exercise programming domestication for Taiwan's market only. In other words, even though the local management of transnational cable channels realizes the importance of domesticating programming, strategies of domestication exercised by those channels cannot be completely and exclusively tailored to Taiwan's market and audience. This seems to be a dilemma for most of the TNMCs targeting diverse markets.

Participants of the three focus group discussions demonstrated great interest in programmes on transnational cable channels. Meanwhile, they were all vehement in their demands for Chinese subtitles for non-locally produced programmes while demands for Mandarin dubbings varied according to viewers' educational levels. As for other domestication strategies, members of the focus groups expressed diverse preferences depending on various programming types.

According to these participants, the popularity of cable programmes and channels depends not only on domestication of programming, but also on quality of production. Comparatively speaking, the focus groups concurred that some transnational cable channels in Taiwan are more popular than most of Taiwan's domestic cable channels.

## Concluding Remarks

Compiling all the research results from programme content analysis, in-depth interviews and focus group discussions, conclusions proposed by this study are as follows.

The majority of programmes on transnational cable channels are either entertainment or children's programming. However, there is a statistically significant difference among channels in terms of their programming types. Three out of five channels surveyed, including HBO, Disney Channel and STAR Sports, offer no locally produced programmes while more than half of the programmes on Super TV and MTV are locally produced. Statistically, there is a significant difference among channels in terms of their local productions.

As for non-locally produced programmes, all of these on HBO, Super TV and Disney Channel employ at least one programming domestication strategy, while 75 percent of such programmes on MTV and 47 percent of programmes on STAR Sports use at least one domestication strategy. However, there is a statistically significant difference among channels in terms of domestication strategies. For those non-locally produced programmes, adding Mandarin on-air promotions and dubbing are two of the most popular domestication strategies used by the five transnational cable channels, followed by teasers, Chinese subtitles, Mandarin voiceover, Taiwanese commentators, Taiwanese hosts and local Taiwanese footage.

As discussed previously, transnational cable channels in Taiwan enjoy certain advantages to attract domestic audience members in terms of programming domestication. Local high-ranking managers of transnational cable

channels acknowledge the value of the strategy of programming domestication. Transnational cable channels enhance programming domestication to improve popularity and audience ratings in each local market. However, transnational cable channels do not necessarily focus on one singular country or a same-language market such as Taiwan since they normally offer services to conjunct broadcasting markets covering several countries, which has seemingly become a hindrance for transnational media corporations in their pursuit of expanding their local market share and luring more domestic audience members.

The most successful approach to programming domestication is the one that balances imported and domestic qualities to best suit the needs and wants of locals from diverse populations. Therefore, transnational media conglomerates should conduct further research into local markets on a regular basis to determine how to gain and retain a discriminating audience.

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1. The Government Information Office is Taiwan's regulatory institution on media.
2. The fourth channel is the colloquial name for those unsanctioned cable systems in Taiwan.
3. A transnational cable channel here refers to one that is wholly owned by a foreign company. The definition excludes any channel that has both local and foreign investment.
4. At: [www.gio.gov.tw/info/radiotv/satellite](http://www.gio.gov.tw/info/radiotv/satellite).
5. STAR TV, owned by Hong Kong billionaire Li Ka Shing, was launched in late 1990. In 1993, Rupert Murdoch paid US\$525 million for a 64 percent stake of STAR.
6. The Taiwanese government prohibited Japanese films, television programming or videos being imported into Taiwan after both countries suspended diplomatic relations in December 1973. Thereafter, Japanese media products were totally banned in Taiwan until 1992, when the government gradually reopened its market to Japanese films, music and television programming.

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## Interviews with the Cable Channels' Senior Management

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